

POINTS CONSULTING
PROFESSIONAL SERVICES AGREEMENT WITH THE CITY OF BISBEE
ARIZONA FOR A COMPREHENSIVE HOUSING STUDY

Date: October 5, 2024 Client:
City of Bisbee, Arizona

This Contract for Services is made effective as of October 5, 2024 by and between the City of Bisbee, Arizona of 76 Erie Street, Bisbee AZ 85603 (the "Recipient"), and Points Consulting LLC of 120 N. Line Street, Moscow, Idaho 83843 (the "Provider").

1. DESCRIPTION OF SERVICES. Beginning on October 5, 2024, Points Consulting LLC will provide to the Recipient the following services (collectively, the "Services"):

See Appendix A for scope of work details.

2. PAYMENT. Payment shall be made to Provider according to the following schedule:

Total Fee: \$118,670.00

Provider would invoice Recipient monthly based on percentage completion toward the tasks and other items outlined in Table 1. Invoices are typically sent within one week following the 3rd Thursday of each month with payable terms of Net 30 Days post reception.

Table 1: Costs

Task	Cost
1: Project Launch & Administration	\$12,520
2: Document & Ecosystem Review	\$9,450
3: Community Outreach	\$23,220
4: Data Collection & Market Research	\$13,620
5: Gaps & Barriers Analysis	\$11,450
6: Recommendations	\$13,200
7: Affordable Housing Plan	\$13,360
8: Community Rollout & Educational Campaign	\$12,780
Travel Costs	\$9,070
Grand Total	\$118,670

If the Recipient fails to pay for the Services when due and approved by Recipient consistent with this Contract, Points Consulting LLC has the option to treat such failure to pay as a material breach of this Contract and may cancel this Contract and/or seek legal remedies.

All checks are due by mail to the Provider's Address (PO Box 8487, Moscow, Idaho 83843).

Provider shall be paid within thirty days of submitting an itemized statement of account to the Recipient contract offer for review and approval. All approved amounts shall be processed for payment by the

Provider within 30 days. In the event the Recipient questions any amount invoiced, that portion of the invoice will be withheld from the next payment. Provider shall be informed of the questioned amount, and shall be given an opportunity to explain or further substantiate the amount claimed. When a questioned amount has been substantiated and is approved for payment by the Recipient, it shall be promptly paid.

3. TERM. This Contract will terminate automatically upon completion by Provider of the Services required by this Contract. The schedule of deliverables is as follows:

In all cases, successful delivery of work product is contingent on Client providing necessary inputs and feedback for Provider to complete work within the desired timeline. Lastly, all deliverables will be completed by no later than April 30, 2025.

4. WORK PRODUCT OWNERSHIP. Provider acknowledges that Recipient is an Arizona municipal corporation and is funding this Project through Arizona State Housing Trust Funds from the Arizona Department of Housing and therefore The work product and Project Deliverables are ownership of the Recipient.

5. CONFIDENTIALITY. Provider, and its employees, agents, or representatives will not at any time or in any manner, either directly or indirectly, use for the personal benefit of Provider, or divulge, disclose, or communicate in any manner, any information that is proprietary to Recipient. Provider and its employees, agents, and representatives will protect such information and treat it as strictly confidential. This provision will continue to be effective after the termination of this Contract. Any written waiver by Recipient of these confidentiality obligations which allows Provider to disclose Recipient's confidential information to a third party will be limited to a single occurrence tied to the specific information disclosed to the specific third party, and the confidentiality clause will continue to be in effect for all other occurrences.

6. USE OF WORK PRODUCT FOR MARKETING PURPOSES. Unless otherwise specified in writing by the Recipient, it is assumed by the Provider that all publicly available non-confidential information, including project scope of work and final deliverables, can and will be used by the Provider for marketing and advertising purposes. These purposes include, but are not limited to, social media summaries, sharing of project deliverables with third-parties, and presenting about project findings to third-parties.

7. DEFAULT. The occurrence of any of the following shall constitute a material default under this Contract:

- a. The failure to make a required payment when due.
- b. The insolvency or bankruptcy of either party.
- c. The subjection of any of either party's property to any levy, seizure, general assignment for the benefit of creditors, application or sale for or by any creditor or government agency.

d. The failure to make available or deliver the Services in the time and manner provided for in this Contract.

8. REMEDIES. In addition to any and all other rights a party may have available according to law, if a party defaults by failing to substantially perform any provision, term or condition of this Contract (including without limitation the failure to make a monetary payment when due), the other party may terminate the Contract by providing written notice to the defaulting party. This notice shall describe with sufficient detail the nature of the default. The party receiving such notice shall have 5 business days from receipt of such notice to cure the default(s). Unless waived in writing by a party providing notice, the failure to cure the default(s) within such time period shall result in the termination of this Contract.

In the event that either party feels that the other party has not fulfilled obligations outlined in this Contract, that party agrees to first approach the other party in order to resolve the difference. In the event that such efforts prove unproductive and the breach of contract is large enough to be of material consequence to either party, both parties agree to listen and participate in a good faith effort to the advice of a third-party mediator who is jointly agreed upon by both parties. The mediator shall have no direct familial or financial relationship with either party. Both parties agree to listen to the advice of the mediator in an effort to resolve the difference in opinion. However, neither party is required to accept said mediator's recommendations and advice.

9. FORCE MAJEURE. If performance of this Contract or any obligation under this Contract is prevented, restricted, or interfered with by causes beyond either party's reasonable control ("Force Majeure"), and if the party unable to carry out its obligations gives the other party prompt written notice of such event, then the obligations of the party invoking this provision shall be suspended to the extent necessary by such event. The term Force Majeure shall include, without limitation, acts of God, fire, explosion, vandalism, storm or other similar occurrence, orders or acts of military or civil authority, or by national emergencies, insurrections, riots, or wars, or strikes, lock-outs, work stoppages or other labor disputes, or supplier failures, or pandemics. The excused party shall use reasonable efforts under the circumstances to avoid or remove such causes of non-performance and shall proceed to perform with reasonable dispatch whenever such causes are removed or ceased. An act or omission shall be deemed within the reasonable control of a party if committed, omitted, or caused by such party, or its employees, officers, agents, or affiliates.

10. DISPUTE RESOLUTION. The parties will attempt to resolve any dispute arising out of or relating to this Agreement through friendly negotiations amongst the parties and in accordance with section 8. Remedies.

11. ENTIRE AGREEMENT. This Contract contains the entire agreement of the parties, and there are no other promises or conditions in any other agreement whether oral or written concerning the subject matter of this Contract. This Contract supersedes any prior written or oral agreements between the parties.

12. SEVERABILITY. If any provision of this Contract will be held to be invalid or unenforceable for any reason, the remaining provisions will continue to be valid and enforceable. If a court finds that any provision of this Contract is invalid or unenforceable, but that by limiting such provision it would

become valid and enforceable, then such provision will be deemed to be written, construed, and enforced as so limited.

13. AMENDMENT. This Contract may be modified or amended in writing by mutual agreement between the parties, if the writing is signed by the party obligated under the amendment.

14. GOVERNING LAW. This Contract shall be construed in accordance with the laws of the State of Arizona.

15. NOTICE. Any notice or communication required or permitted under this Contract shall be sufficiently given if delivered in person or by certified mail, return receipt requested, to the address set forth in the opening paragraph or to such other address as one party may have furnished to the other in writing.

16. WAIVER OF CONTRACTUAL RIGHT. The failure of either party to enforce any provision of this Contract shall not be construed as a waiver or limitation of that party's right to subsequently enforce and compel strict compliance with every provision of this Contract.

17. INDEMNIFICATION: Each party agrees to indemnify, defend, and hold harmless the other party from and against any loss, cost, or damage of any kind (including reasonable outside attorneys' fees) to the extent arising out of its breach of this Agreement, and/or its negligence or willful misconduct. This indemnity shall not cover any claims in which there is a failure to give the indemnifying party prompt notice, but only if and to the extent that such failure materially prejudices the defense

18. CONSTRUCTION AND INTERPRETATION. The rule requiring construction or interpretation against the drafter is waived. The document shall be deemed as if it were drafted by both parties in a mutual effort.

19. ASSIGNMENT. Neither party may assign or transfer this Contract without the prior written consent of the non-assigning party, which approval shall not be unreasonably withheld.

20. PERFORMANCE. Provider agrees that it will at all times, faithfully, industriously, and to the best of its abilities, experience and talents, perform all of the duties that may be required of and from Provider under this Contract consistent with the highest standards of the applicable profession.

21. TAXES. Provider shall be liable for the payment of all taxes, which may become due and payable by Provider on account of this Contract or payments made hereunder.

22. CONFLICT OF INTEREST. The Agreement is subject to the provisions of A.R.S. § 38-511.

23. E-VERIFY REQUIREMENTS. To the extent applicable under A.R.S. § 41 4401, Provider and its subcontractors warrant compliance with all federal immigration laws and regulations that relate to their employees and their compliance with the E-verify requirements under ARIZ. REV. STAT. § 23-214(A). Provider's or its subcontractor's breach of the above-mentioned warranty shall be deemed a material breach of this Contract and may result in the termination of this Contract by the Recipient. The Recipient retains the legal right to randomly inspect the papers and records of Provider and its subcontractors who work on this Contract to ensure that Provider and its subcontractors are complying with the above-mentioned warranty.

24. **ISRAEL.** To the extent applicable under A.R.S. § 35-393 through § 35-393.03, the Parties hereby certify that they are not currently engaged in, and agree for the duration of this Contract to not engage in, a boycott of goods or services from Israel, as that term is defined in A.R.S. § 35-393.
25. **FORCED LABOR OF ETHNIC UYGHURS PROHIBITED.** To the extent applicable under A.R.S. § 35-394, by entering into this Contract, Provider certifies and agrees Provider does not currently use and will not use for the term of this Contract: (i) the forced labor of ethnic Uyghurs in the People's Republic of China; or (ii) any goods or services produced by the forced labor of ethnic Uyghurs in the People's Republic of China; or (iii) any contractors, subcontractors or suppliers that use the forced labor or any goods or services produced by the forced labor of ethnic Uyghurs in the People's Republic of China.
26. **ASSIGNMENT.** Neither Party will have the power to or will assign any of the duties or rights or any claim arising out of or related to this Contract, whether arising in tort, contract or otherwise, without the prior written consent of the other Party. Any unauthorized assignment is void and unenforceable. These conditions and the entire Contract is binding on and inures to the benefit of the Parties and their respective permitted successors and assigns.
27. **CAPTIONS AND HEADINGS.** The captions and headings of Sections contained in this Contract are inserted as a matter of convenience and for reference, and do not affect the scope or meaning of this Contract or the intent of any provision hereof.
28. **COUNTERPARTS.** This Contract may be executed in any number of counterparts, all such counterparts shall be deemed to constitute one and the same instrument, and each of said counterparts shall be deemed original hereof.

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed by their duly authorized representatives as of the date first above written.

Service Recipient: City of Bisbee, Arizona

By: Anna Cline
Anna Cline, Mayor Pro Tempore, City of Bisbee

10-01-2024
Date

ATTEST:

Ashlee Coronado
Ashlee Coronado, City Clerk

APPROVED AS TO FORM:
[Signature]
Joseph D. Estes, City Attorney

Service Provider:
Points Consulting LLC

By: [Signature]
Brian Points, President, Points Consulting

10/2/24
Date

Appendix A: Scope of Work Details

PC understands the City of Bisbee requires thorough analysis of current and future housing needs, vacancies, and characteristics to inform City policy and the Updated Comprehensive Plan. Moreover, results must be translated into recommendations and an implementable action plan that promotes healthy residential development and communicates the importance of affordable housing. With the completion of this study, our intention is that the City of Bisbee will be able to confidently answer these important questions for its residents, planners, developers, and stakeholders:

- What are the characteristics of current housing stock and trends in production over the past ten years?
- What is the precise demand for housing from now through the year 2040 including various housing typologies, price levels, and housing tenure (i.e. renter/owner)
- What types of housing (multifamily, ADUs, alternative housing) are not supplied (or undersupplied) that Bisbee could support more of? And, what is the unmet demand gap for these housing types?
- How many Bisbee residents are cost burdened or severely cost burdened by current housing costs?
- How can Bisbee promote equity in affordable housing?
- How are short-term rentals (STRs) affecting regional housing stock, and what effect are local STR policies having on the overall market?
- Could more procedural and zoning changes (in addition to density bonuses and looser ADU/tiny home regulations) be made to facilitate growth?
- Could Inclusionary Zoning Ordinance programs (mandatory or voluntary) be created to offer developers incentives to provide affordable housing units?
- What resource constraints exist in Bisbee and the surrounding area that might prevent supply from meeting demand (including factors such as land, water, zoning code, and labor availability)?
- What efforts can Bisbee make on the housing front to retain residency of young families and workforce aged populations?
- Could current development policies be modified to reduce or remove affordable development fees such as building permit fees, planning fees, and water/sewer tap fees without negative impacts?
- What efforts could the City make to incentivize historic home ownership and renovation in Bisbee, while preserving the integrity of the historic district and the architectural standards set by the Design Review Board?
- What are responsible growth management policies regional leaders can implement to balance public costs of development with potential tax and income revenue so that "growth pays its own way"?

Our analysis, as described in the following scope of work, is designed to answer these and other important questions. As is noted throughout the proposal, we recognize both the importance of high-quality research and strong solutions for alleviating identified issues.

Task 1: Project Launch & Administration

If selected, PC will initiate an on-site meeting, during which key members of the PC team will meet with the designated project lead or committee organized by the City's Planning Department. The purpose of the meeting is to introduce the PC team to local contacts, review project goals, deliverables, and objectives, discuss preliminary data findings, and answer a variety of administrative questions. The following topics are to be discussed at the meeting:



- Identifying Bisbee's point of contact or project manager and steering committee
- Clarification of responsibilities and roles of each party throughout the duration of the project
- Planning ahead for future on-site meetings and key milestone dates
- Determining and introducing other partners and stakeholder groups that the PC team should engage with for information, perspectives, and feedback throughout the course of the project
- Identifying and sharing additional resources, reports, and datasets that should be utilized throughout the course of the engagement
- Identification of any preferred locations for residential development in the eyes of local government staff
- Discussion of ideas, trends, and perspectives that the steering committee may have related to housing needs that the project team should further explore during the analysis
- Confirmation of expected deliverables, formats, and schedule

PC further recognizes that the success of this project requires an in-depth understanding of the region's culture, economy, sentiments, and demographics. Hence, in addition to hosting the official project launch meeting, our team will spend some additional time touring the City of Bisbee and surrounding area to get first-hand experience with the community. Any neighborhoods or properties emphasized by the steering committee will be particularly focused on.

The project launch meeting will provide the steering committee and the PC team with a shared vision for the goals, context, overall timeline, and project milestones that will be adhered to throughout the course of the engagement.

Deliverable: Overall Project Timeline & Basic Assumptions

Task 2: Document & Ecosystem Review

Following the on-site meeting, the PC team will conduct qualitative research of existing documents that are relevant to regional residential housing development. The exact documents will vary on a case-by-case basis, but our team anticipates reviewing the following resources:

- City of Bisbee Action Plan (February 2017)
- City of Bisbee General Plan Update, Volumes I & II (2014, 2015)
- City of Bisbee TAP Summary Report (2015)
- Bisbee Area Mobility Master Plan (2023)
- Explore Cochise FY2020-2021 Strategic Marketing Plan
- Cochise County Comprehensive Plan (2015)
- Zoning maps and codes for Bisbee
- Annual reports for the City, specifically related to building permits, development fees, and property tax revenue

- Any other updated or additional community and economic development related reports

Housing markets do not develop in a vacuum but instead are based on the hyper-local context of regional opportunities, incentives, and land-use regulations. Research on these topics will prepare the project team to analyze trends not just from a data perspective but contextually.

Task 3: Community Outreach

Though quantitative data are highly important to this study, it is also important to collect qualitative information from residents and regional leaders. As such, PC proposes information be collected through a series of in-depth interviews with regional leaders, a townhall meeting, and a community survey. For all aspects of stakeholder engagement, community input will be non-attributable to any specific individuals. Through the process outlined here, the PC team will build a rapport and relationship with the Bisbee community that will set up our team to help the City implement the Affordable Housing Action Plan (addressed in Task 8).

In-Depth Interviews

Interviews may be a hybrid mix of in-person, virtual using Zoom, or by telephone. Interviewees will include a broad array of community members including elected officials, city/county staff, representatives of major employers, non-profit leaders, real estate developers/builders, and any others recommended by the steering committee.

Community Survey

The PC team is skilled in survey development, having facilitated 50+ community surveys on a variety of topics. Our team will conduct a community survey targeted to residents within the City of Bisbee designed to gauge input of current housing needs, barriers to obtain affordable housing, demographic information, preferences related to types of homes, and other such inputs. Optionally, the survey can be presented in both Spanish and English to help reach more marginal population segments.

Our team will recommend a set of topics to include in the survey, which will include both closed-ended questions and open-ended questions. In our experience, surveys should not include exclusively open-ended questions both because such data are difficult to quantify and because they can be daunting to casual survey takers. Closed-ended survey questions will include an array of question types, including single choice, multi-choice, Likert style, and ranked choice, to name a few. To attain optimal participation, the electronic survey would contain only a handful of questions, requiring fewer than ten minutes to complete. As with our prior studies of this nature, PC will seek to elicit not just perspectives on residents' housing preferences, but also what they are willing to accept as *tradeoffs* to allow for the creation of more affordable housing. Questions of this kind focus on presenting images of various housing types and asking where in the community such housing would be suitable.

Expanding reach is one of the most important factors in ensuring a quality responses rate when fielding surveys. Rather than relying solely on the steering committee to forward the survey out via its channels, our team seeks to get direct engagement with the community. This is done through a combination of social media ads (namely Facebook, Instagram and LinkedIn), features and ads in local newspaper publications (such as The Bisbee Observer), and radio spots with local radio stations. Lastly, we would canvas the town with flyers advertising the community survey, posting in public bulletin board locations (such as public buildings, grocery stores, coffee shops, etc.)

Using these multimedia marketing tactics and relationships with steering committee members, our team is confident that a robust sample of at least a few hundred residents can be surveyed through these means. Provided the City is amenable, PC could also propagate the survey via existing communication methods such as utilities bills. When these tactics have been used previously, they have significantly enhanced community response rates.



Sample survey flyer & mailer with QR Codes

Community Townhalls

For community members seeking deeper information on housing topics, townhalls are an ideal tool. This will provide PC the opportunity to explain our study, why the topic is important, and gather community input on housing preferences and opportunities. The event can be promoted both via official municipal channels and boosted via PC’s paid Facebook Ads, which tend to generate a reach of several thousand people. PC will conduct at least one in-person Townhall and one remote Townhall. Events will be scheduled at times and locations suitable for a variety of audiences, but depending on the time decided upon, the townhall could also serve as a chance to further propagate the community survey.



PC Townhall in San Juan County, Utah, 2024

Deliverable: Community Engagement Summary Report

Task 4: Data Collection & Market Research

Analysis of the existing supply of housing, past and recent trends, and ongoing developments are essential to any housing study. To conduct this analysis, the team will utilize our experience and understanding of a diverse array of data sets and processes to obtain the most comprehensive and up-to-date possible portrait of regional housing supply and demand.



Demographic Analysis

The demographic analysis will provide an overview of existing trends related to the region's population, including both individual and household-level statistics. Specific data points may include but are not limited to:

- Population - past and projected growth rate, age, race/ethnicity, per capita income, income due to transfer payments, poverty rates, net worth, counts of disadvantaged populations (veterans, disabled individuals, etc.), housing units per capita, and educational attainment
- Households - including overall number, median household size, income distributions, household composition; net worth, purchasing patterns, and Esri Community Tapestries segmentation
- Workforce - past and projected employment and earnings growth, jobs-to-housing ratio, employment by specific industry and occupation, commute patterns, migration patterns, and cost-of-living statistics.
- Transportation - means to work, access to transportation lines, commute distance and location, etc.

Industry and Workforce Analysis

The first step to better serving and retaining a healthy workforce population is understanding current industry trends with relation to the regional housing landscape. Building off the demographic analysis, an overview of the existing employment, commuting, migration, and workforce characteristics will highlight the need for housing to correspond with employment in certain areas. This assessment will also consider detailed information by industry and occupational classification and provide a jobs-to-housing ratio for the City. Our team will factor in the spatial component of housing, employment, and transportation to uncover the existing relationship among land uses. In addition, specific areas may respond differently to economic growth cycles and recessions, so the project team will assess how Bisbee has trended during recent periods of expansion and recession.

Existing Housing Stock

The project team will compile data estimating the number and type of housing units in each geographic subregion, as well as trends in production of housing. Our aim in such an analysis is to look at all facets of the housing market including single-family dwellings, middle density, multi-family, low-income/subsidized housing, and even non-conforming dwellings for the homeless. Aggregated information from Multiple Listing Service (MLS) will also be utilized to indicate current metrics such as inventory on the market, average and median days on the market, number of closed sales, homes taken off the market, and other useful information.

During this analysis, it will be particularly important for the City and its partners to furnish PC with any data sets that analyze information at the city as well as county levels, as most federal databases default to groupings such as county and zip code. We will compile information about the number of housing units of various types within the region of analysis, including difficult to quantify categories such as those living in overcrowded dwellings, and marginally homeless persons (such as those living vehicles and RVs, for example). The following summarizes the key aspects we will analyze:

- Home values currently and over time
- Rental costs by unit type and size
- Building permits
- Utility cost burdens
- Housing characteristics (e.g., size, age of unit, tenure, number of rooms)
- Housing density by Census Tract
- Geographic dispersion of sales by price point
- Rate of federal mortgage loans and applications
- Identification of overcrowded and less habitable areas
- Other physical and occupancy characteristics, as appropriate

Vacant & Abandoned Properties

Vacant residences present both one of the biggest frustrations and opportunities for communities who are concerned about housing affordability. Not only do such properties not survey as housing for households who are in need, but they can also bring down quality and safety of the surrounding neighborhood (via the "broken window effect.") The PC team will catalogue all such properties among the City's 3,100+ residential units. To do so, PC will leverage both existing lists available from the City and our proprietary property data tool Regrid, which has data on ownership, tax collections, and IRS-based occupancy status.

This list will be delivered in excel format as a component of the overall study but also serve as a resource for our team investigating the implication and impact of various policy suggestions and scenarios.

Planned Developments

The PC team will collaborate with the steering committee, economic and community developers, local realtors, and real estate developers to identify in-progress and potential housing developments. This analysis will include all stages of the development life cycle including developments in-progress, for sale and entitled sites, and early-stage development discussions. We will inventory planned residential development and land available for future residential development within the region of analysis, including infill, adaptive, and redevelopment opportunities. This inventory will provide an up-to-date overview of future short-term additions to the supply of regional housing, as well as opportunities for more significant expansions. PC will also identify alternative housing opportunities,

Core Data Sources

The consulting team relies on reputable and widely sampled data sources. A sample of our data sources (including those to be facilitated by the steering committee) include the following, and will be used throughout the project:

- AirDNA
- American Community Survey (US Census)
- Bureau of Economic Analysis
- Bureau of Labor Statistics)
- Data Tactical Group Labor Market Information
- Esri Business Analyst
- Federal Housing Finance Agency
- Housing & Urban Development (HUD)
- Arizona Office of Economic Opportunity projections
- Arizona Association of REALTORS® Housing Reports
- Local Government: Residential Building & Remodeling Permits



including housing type options such as Tiny Homes, modular and prefabricated units, ADUs, and cottage courts.

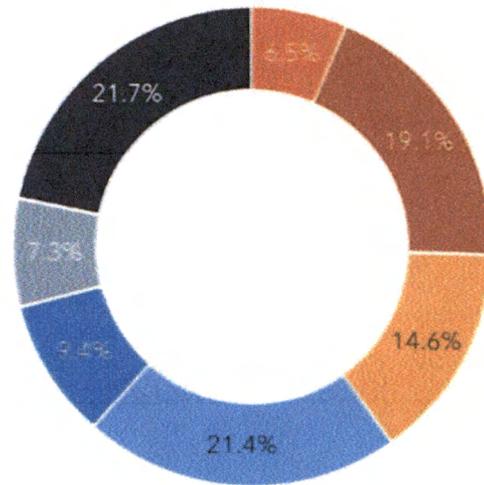
Affordability and Access

The information listed above will feed into our team’s assessment of home affordability at various levels and future housing needs by demographic. The project team will analyze rent and mortgage payment costs to estimate affordability levels throughout the City. The affordability analysis will be multi-faceted accounting for various income levels and groups including the following, according to Area Median Income (AMI):

- Marginally housed/homeless population
- Very low income (<30% of AMI)
- Low income (40 to 60% of AMI)
- Workforce housing (60% to 100%)
- High income housing (100% to 160% of AMI)

In addition, recognizing that housing is a complex and interconnected topic, the consulting team will also study additional market segments such as seniors, first-time home buyers, young professionals, and high-income (up to 160% AMI) groups. To corroborate data on affordability and access, we will also collect data on foreclosure rates, those at risk of eviction, those living vehicles or RVs, homelessness data, and amount of available subsidized housing according to Section 8, LIHTC and similar programs. After segmenting the population into these groups, we will determine whether low income and workforce housing populations are adequately served by existing housing supply.

Households that can afford to buy an average-priced home in Broken



- \$35,000 - \$49,999
 - \$50,000 - \$74,999
 - \$75,000 - \$99,999
 - \$100,000 - \$149,999
 - \$150,000 - \$199,999
 - \$200,000+
 - Below Necessary Income Requirements
- Source: PC 2024 City of Broken Arrow, OK Housing Assessment

Task 5: Gaps & Barriers Analysis

Filling gaps in housing supply can come with plenty of barriers to overcome, and it is essential the City capitalize on available opportunities to meet needs as they arise. To identify these opportunities and facilitate ease of development for necessary housing units, PC will calculate the amount of land available to Bisbee. This goes hand in hand with identifying re-developable/reusable and infill opportunities to convert currently underused buildings and property into housing. Multiple things would need to be considered to complete this task:

- Alignment with the City’s comprehensive plans and goals
- Feasibility of purchasing a home according to current income, home values, and credit requirements for the region, by income level
- Capacity constraints and accessibility
- Feasibility of renting a home, while not sinking into cost-burdened status by income level
- Costs for new housing development and infill (by housing type and square footage)
- Current regulations and code restrictions as they relate to development

PC will assess risks unique to the area and methods of prevention, along with environmental or terrain considerations associated with new developments. Engagement with local experts and entities involved in these subjects conducted during Task 3 will be highly influential at this time. Armed with research on these topics, PC will be able to anticipate potential barriers and lay the groundwork for brainstorming solutions, recommendations, and strategies.

Task 6: Recommendations

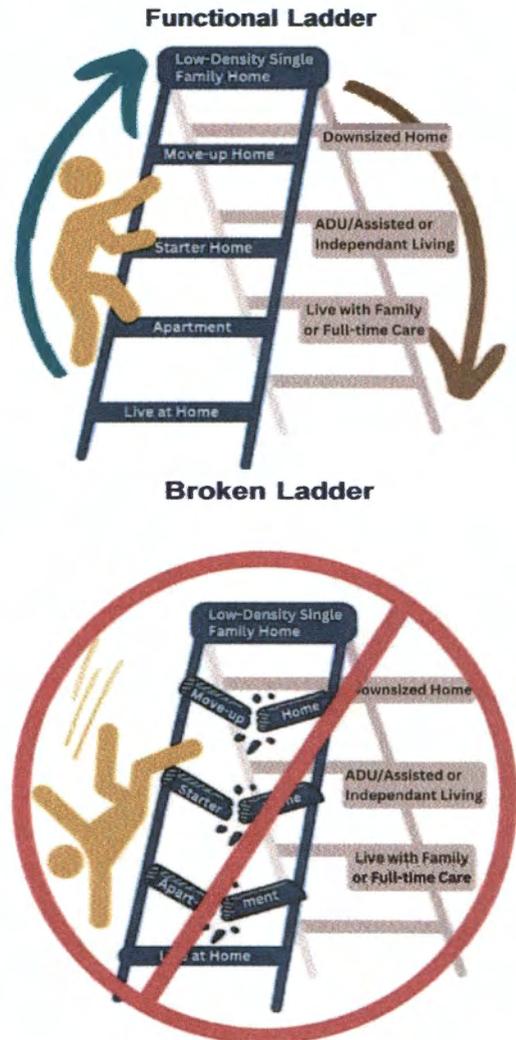
Different communities are uniquely affected by economic forces, policies, and residents' interests, and in small towns these effects are often exacerbated. Just one under-supplied housing type can spell trouble for a developing town, as this can easily disadvantage an entire demographic of people. Using our understanding of Arizona land-use policies, local conditions, and best practices from other similar communities, the PC team will form an understanding of the community's largest needs, gaps, and opportunities for improving the quantity, quality and variety of housing stock. The analysis will account for both supply and demand forces, unique local conditions and constraints, and the perspectives of local leadership, builders/developers, and the public. Building on information from previous Tasks, the PC team will provide a summary of recommended strategies for increasing housing affordability and choices, including:

- Options for zoning/land-use and other regulations that could spur on more development
- Options for fee waivers, bonuses, and other incentives that could encourage more housing development
- Recommendations on regulations and controls that the City could utilize to ensure appropriate mix of low- and middle-income housing development
- Applicable design and development standard revisions
- Recommended approach for improving and stabilizing existing housing stock, including potential funding sources and improvement loan programs
- Potential local, state, and federal funding sources and creative strategies for funding housing initiatives
- Recommendations on how and where to market Bisbee to attract the right type of developers to meet the needs identified during this study

These recommended housing strategies will serve as the starting point for developing the Affordable Housing Plan. Moreover, the research conducted up to this point will also lead to our Comprehensive Draft report, which will summarize all statistics, narrative, and community feedback to this point.

Deliverable: Draft Comprehensive Housing Study & Recommended Housing Strategies

The Housing Ladder



Task 7: Affordable Housing Action Plan

Making recommendations for consideration by City leadership is an important phase of the process, but the most crucial activities for making real change come after the initial ideation. Many good studies have gone underutilized due to skipping this stage of the process.

During the Affordable Housing Action Plan phase, the PC team will take the necessary time to accomplish buy-in among city leadership for suggested Actions. Given the busy schedules of City Council members and City staff, we recognize it will take time and multiple meetings (more than a simple 15 minute presentation within a City Council session) to absorb the nuances of our findings. We typically recommend several "work sessions" that are outside the typical agenda of City Council, but details depend on the exact format and timing of each community. At this stage, the PC team can iron out various requests based on this feedback including:

- Legal implications and requirements of the suggested actions
- Interviews with community leaders in other locations that have implemented similar actions
- Further investigation on the fiscal or practical impact of the actions on the community.

Once the recommendations are narrowed down to actions that City leadership is confident in embracing, the PC team will work with the steering committee on a goal setting process that fits SMART goal criteria (i.e. specific, measurable, achievable, realistic and time-bound). The PC team will align actions according to overarching Objectives, with corresponding Goals, and Action Items. The Action Items will have specific benchmarks for measuring accomplishment, a definition of the directly responsible parties for carrying out the Action Items, and dates by which changes are expected to occur. This Action Plan will then be presented one final time to City leadership for approval and adoption before implementation begins.

Deliverables: Strategic Housing Action Plan

Task 8: Community Rollout & Educational Campaign

The Affordable Housing Action Plan Task will somewhat overlap with Task 8: Community Rollout & Educational Campaign. Part of how City leadership will measure the implement-ability of the Plan is based on how the community feels about the Plan. Once our team has presented our list of recommendations to City leadership, the project team will host a series of public Townhalls to present these to the larger public, aimed at gauging community feedback to the suggested changes and actions. Similar to the community outreach phase, these meetings will be published and advertised through both social and print media to provide as much reach as possible.

Community sentiments will help to hone, sharpen and guide the development of the Objectives and Action Items proposed to City leadership during Task 7. However, this Task will also extend beyond Task 7, as once the Action Plan is adopted, PC's team will conduct an educational campaign to inform the community about the Plan. This will occur both through traditional means (i.e.: another

Townhall) but also through executive summary videos which will be produced and edited by the PC team and made available to the public via PC's YouTube and social media channels.

This video format allows our team to communicate findings with the general public in an easily digestible format, long after the project has been completed. Examples of such past project summaries are available at Points Consulting's YouTube channel: www.youtube.com/@PointsConsulting.

Deliverables:

- ***Community Townhalls***
- ***Final Comprehensive Housing Study & Presentation***
- ***Executive Summary Video***



PC on-site presentation

Project Timeline

PC estimates this project to be completed by April 30, 2025. Our team has sufficient time available to manage the proposed scope of work, as we conscientiously only pursue projects that align within our team's capabilities and availability. There are no constraints that would affect our team's performance on this project. The only variable outside of our control is ensuring that City staff can execute the contract and generally participate in the project. To this point, Tasks 7 and 8 rely heavily on participation of the steering committee for facilitation of Affordable Housing Action Plan requirements and community engagement as necessary, without which these Tasks are at risk of delay.

Assuming a project launch in early September **2024**, the following schedule outlines key deliverables and expected dates of delivery.

- **Deliverable:** Overall Project Timeline & Basic Assumptions
 - **Estimated Completion Date:** October 25, 2024
- **Deliverable:** Community Engagement Summary Report
 - **Estimated Completion Date:** December 6, 2024
- **Deliverables:** Draft Comprehensive Housing Study & Recommended Housing Strategies
 - **Estimated Completion Date:** January 28, 2025
- **Deliverable:** Affordable Housing Action Plan
 - **Estimated Completion Date:** February 28, 2025
- **Deliverables:** Community Townhalls, Final Comprehensive Housing Study, Presentation, & Executive Summary Video
 - **Estimated Completion Date:** April 30, 2025

Our team generally holds standing bi-weekly catchup calls with each client to keep them apprised of project progress. Other critical on-site or public meeting dates can be adjusted to fit the requirements of the project. PC will be on-site on three or four occasions over the course of the project, at times to be determined during the project. Most project catchup calls would be conducted remotely using Zoom or a comparable technology. In addition to catch-up calls, our team will also produce Bi-Monthly project reports as requested in the RFP, which will include descriptions of activities performed, any experienced setbacks, and methodologies for identifying housing opportunities and solutions.

The following Gantt Chart reflects the project schedule visually in terms of deliverable dates and length of tasks:

